

DRAFT
Caregiver Program REDCap
Data Entry Instructions
V4

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Introduction

*These are directions to enter AFCSP and NFCSP info among three instruments in REDCap system.

*Data Access Groups have been created to protect your agency’s privacy.

*These instruments are not meant to gauge program eligibility.

*These instruments were developed by DHS to gauge the effectiveness of the AFCSP and NFCSP programs. This is not meant to capture the same information repeatedly per caregiver over the full time they are enrolled in either program.

*The customer satisfaction survey is part of DHS’s quality improvement effort to gauge effectiveness, but is not part of this REDCap data entry system.

DHS REDCap Registration

1. You must create a new ID (even if you already have an existing WILMS ID) at:

<https://register.wisconsin.gov/AccountManagement/AccountCreationOverview.aspx>

You will see this screen; click the “Accept” button

The screenshot shows the 'Self Registration' page of the Wisconsin Department of Administration. The page has a blue header with the Wisconsin state logo and navigation links like 'wisconsin.gov home', 'state agencies', and 'subject directory'. Below the header, there's a navigation bar with 'Wisconsin Department of Administration' and 'News | Search | Home'. A secondary navigation bar contains 'Main Menu | Help | FAQ'. The main content area is titled 'Self Registration' and includes a welcome message, instructions for requesting a DOA/Wisconsin Logon and Password, and a section for starting the self-registration process. A 'User Acceptance Agreement' section is visible, containing a scrollable text area with the title 'USER ACCEPTANCE AGREEMENT' and the word 'INTRODUCTION'. Below the text area, there are two buttons: 'Accept' and 'Decline'. A red arrow points to the 'Accept' button. On the right side of the page, there is a 'Customer ID Menu' with links for 'Self Registration', 'Profile Management', 'Password Management', 'Forget your account information?', and 'User Acceptance Agreement'.

2. Fill this top portion of webpage completely:

[Main Menu](#) | [Help](#) | [FAQ](#)

Account Creation

* Indicates Required Field

Profile Information

First Name *

Middle Initial

Last Name *

Suffix

E-Mail *

Phone Use this format 6085551234
 ext.

Mailing Address

Street Address

City

State/Province

Zip Code -

Under ***Systems You Will Access***, scroll down by clicking the down arrow and then click on “**DHS REDCap.**” Clicking DHS REDCap will highlight it, which is what’s needed.

Finish this page by creating **Logon ID/Password**, **Password Recovery Question**, and typing in **Verification Code** as directed. Make sure you remember the answer to your self-chosen verification secret question. Click "Submit."

Systems You Will Access
Use your mouse to highlight the system that you want to access.

Systems *
 *

Account Information
Your Logon ID must be between 5-20 characters and **CAN** be a combination of letters and numbers. Your Logon ID must not contain spaces or special characters.

Logon ID *

Your Password must be 7-20 characters long and **MUST** contain a combination of letters and either numbers or special characters (except the @ ? / signs). Passwords are case sensitive. Your Password cannot contain the Logon ID.
[Password Tips](#)

Password *

Re-enter Password *

Logon ID/Password Recovery
Enter a question and answer for use if you forget your DOA/Wisconsin Logon ID or Password. Your Secret Question and Secret Answer cannot contain your password.
[Secret Question and Answer Tips](#)

Secret Question *

Secret Answer *

Verification
This step helps prevent automated registrations.
If you cannot see the number below [click here](#).

81006 Please enter the number as it is shown in the box to the left. *

[Wisconsin.gov](#) | [Search](#) | [Legal](#) | [DOA Home](#)

After clicking the submit button, you should immediately see this screen. While it tells you that your account was successfully created, there are three more steps you need to complete. Go to step 3 immediately.

The screenshot shows a web page titled "Account Creation" with a navigation bar at the top containing "Main Menu | Help | FAQ". A red message states: "Your DOA/Wisconsin Logon profile was successfully created." Below this are three links: "make changes", "return to DOA/Wisconsin Logon", and "Doa Homepage". A "Profile Information" section lists fields: Logon Id, First Name, Middle Initial, Last Name, Suffix, E-Mail, Phone, Mailing Address, Street Address, City, State/Province, and Zip/Postal Code. A modal dialog box titled "Message from webpage" is overlaid, containing a yellow warning icon and the text: "Thank you for your registration. An administrator will be validating your registration." with an "OK" button.

3. Log onto DHS REDCap with new username and password that you just created.
(CTRL + Click on link): <https://redcap.wisconsin.gov/>

REDCap™

Log In

DHS REDCap requires a Wisconsin Logon Management System (WILMS) account for login.

To create or reset a WILMS ID, please go to <https://register.wisconsin.gov>

If you need further logon or project assistance, please contact [DHS REDCap Administrator- Stephanie West](#)

NOTE: If you need access to a project or a group of projects, please email DHS REDCap Administrator the project name(s) and your WILMS user id.

Please log in with your user name and password. If you are having trouble logging in, please contact [The WILMS Helpdesk](#).

Username:

Password:

Log In

Welcome to REDCap!

You will see a screen that looks like the following. Fill this out completely and click the submit button.

[Log out](#)

Basic User Information Form

Before accessing REDCap, we first need to obtain some basic information about you. Please enter ALL the fields below and then hit the Submit button. Once this information is saved, you can change it any time by navigating to the My Profile page, which you will find the link to at the top right of every page.

Username:

First name:

Last name:

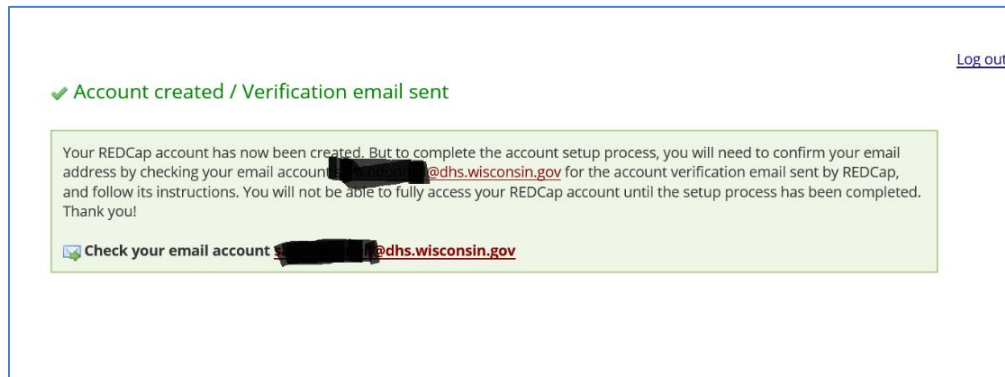
Email:

Re-enter email:

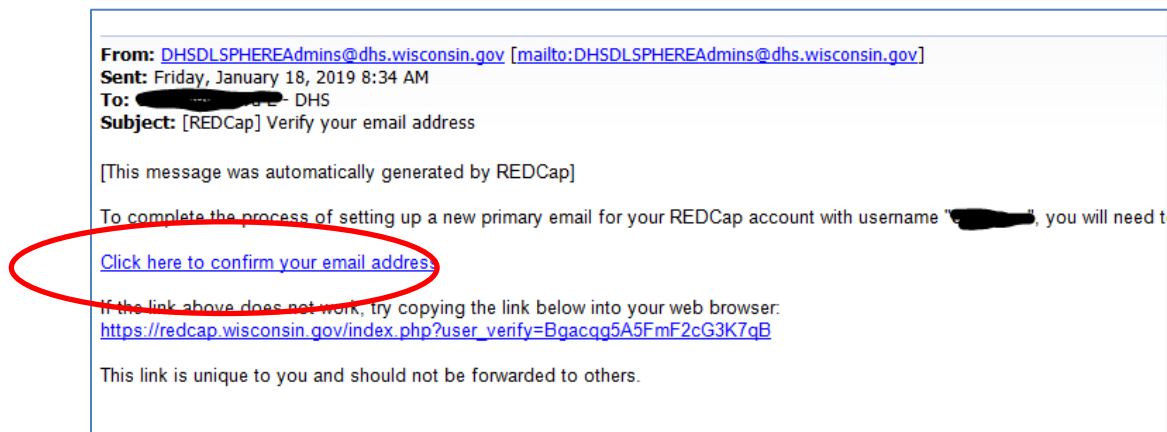
NOTE: The email address entered above will first need to be verified before access to REDCap is granted. After clicking the Submit button, an email will be sent to that email account, after which you will need to click the link inside the email to verify your email account before accessing REDCap.

Submit

After clicking submit, you will receive following message. Go to Step 4.



4. Go to your e-mail inbox. You will receive an e-mail that looks like the example below. The sender of this e-mail is DHSDLSPHEREAdmins@dhs.wisconsin.gov. Open the e-mail and click the link that confirms your e-mail address. (Please check your e-mail's junk mail folder or spam folder if you have not received this in your inbox.) Go to Step 5.



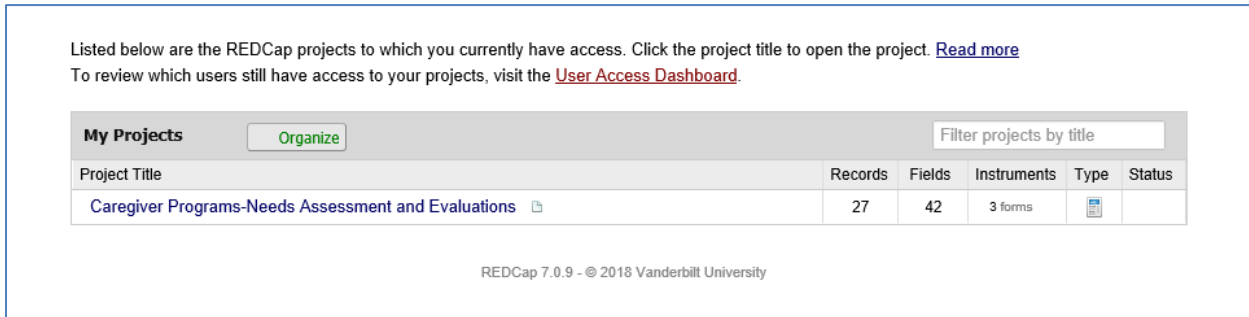
5. *****This final step is very important***** Send an email to Eric and Lynn in the State Aging Office, eric.grosso@wi.gov and lynn.gall@wi.gov, that includes your newly created username and the name of your agency so that we can enter it into DHS REDCap. Do not send us your password.

You can only access DHS REDCap after we enter your newly created username into the project. The DHS Office on Aging will send an email confirming registration when complete.

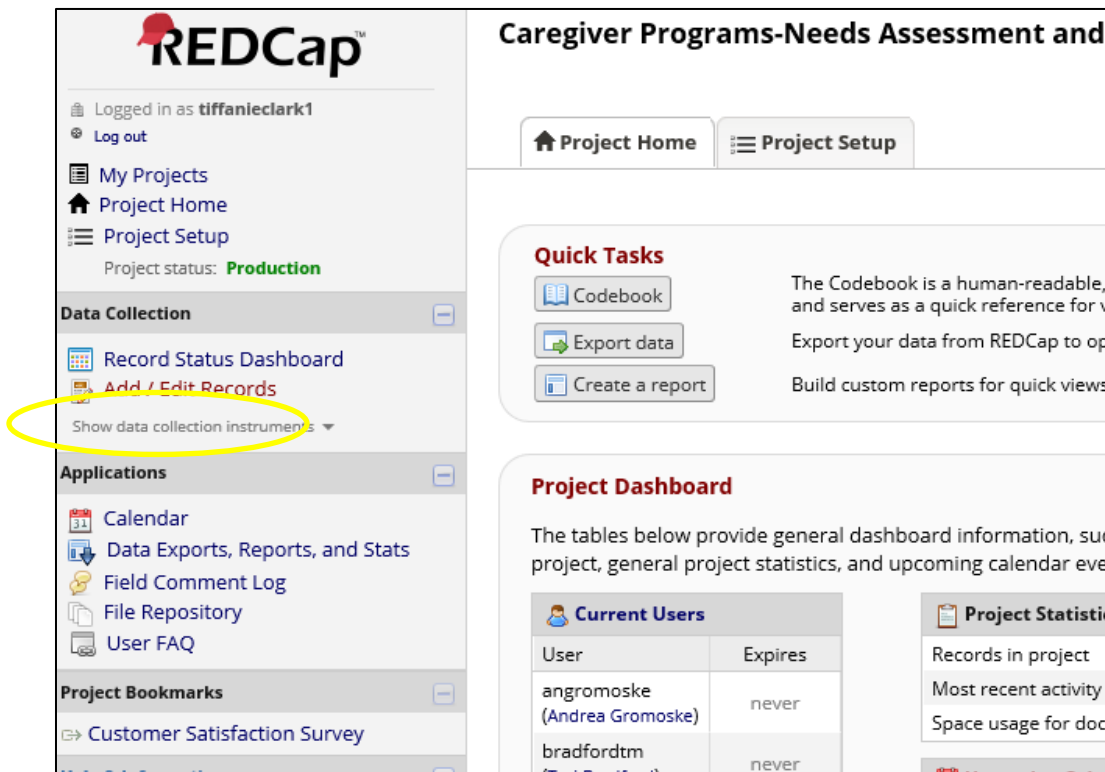
After confirmation that your username has been placed into DHS REDCap, test your access by logging into DHS REDCap <https://redcap.wisconsin.gov>. It should open under a tile called “My Projects” and you should see a single project named **“Caregiver Programs-Needs Assessment and Evaluations.”** You are now able to enter data.

Using the DHS REDCap Data Collection System

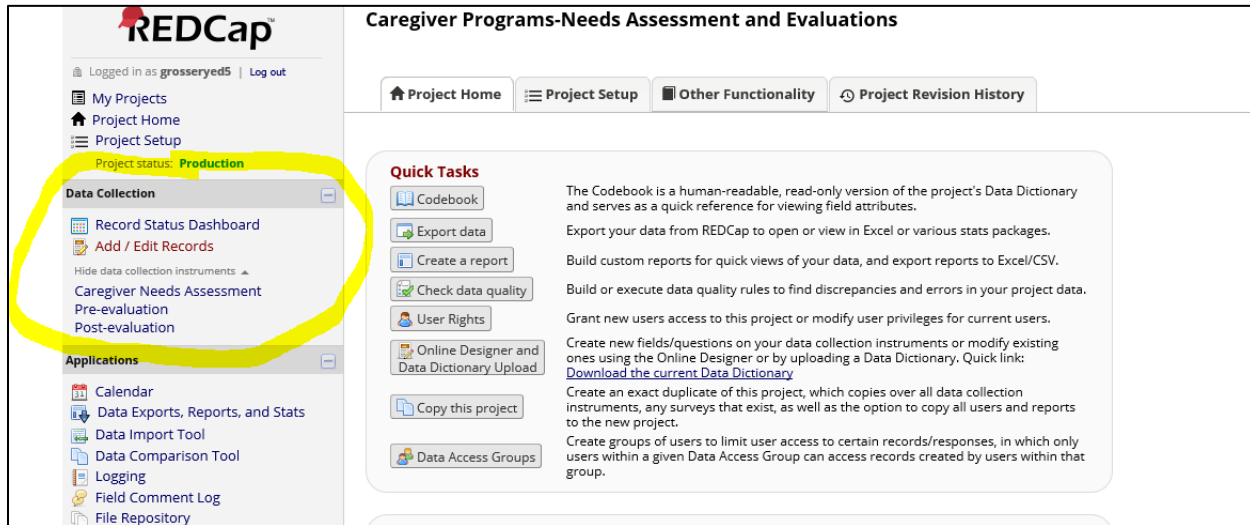
1. Log in using your DHS REDCap ID and password: <https://redcap.wisconsin.gov/>
2. You should see a screen that looks the one below. This is under **My Projects** tile at the top of the page. Click the link named **Caregiver Programs-Needs Assessment and Evaluations**. This is the only project you will be able to access.



You will be brought to a screen showing the tab, “Project Home.” Look to the left margin, to the section named **Data Collection**. If the gray text in this section reads as “Show data collection instruments,” then please click this text so it expands to show the project’s **three data collection instruments: Caregiver Needs Assessment, Pre-evaluation and Post-evaluation**.



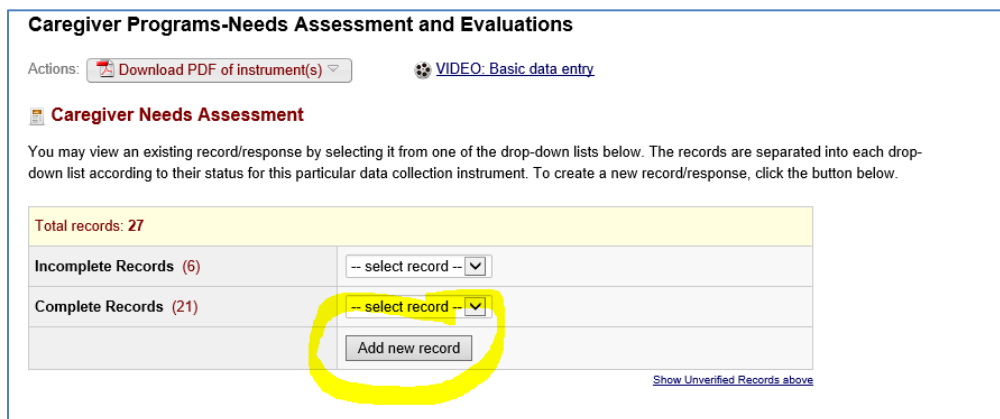
This is what the expanded instrument list looks like:



The **Data Collection** section, circled above, is the main area where you will do all data entry. You may create new caregiver records and edit existing ones. The **Record Status Dashboard** will be very helpful to create, edit and keep track of a caregiver’s instrument completion progress. This dashboard will be explained in more detail later in this training.

[Always Start a New Caregiver Record with a Caregiver Needs Assessment](#)

3. Click the **Caregiver Needs Assessment** link. The Caregiver Needs Assessment should always be used first when entering a caregiver into DHS REDCap. It is the only of the three instruments in the project where you will enter the customer’s personally identifying information and information about you and your agency, and it is where an ID code is automatically attached to each caregiver. The pre- and post-evaluations will be automatically linked to this Caregiver ID later in the process without you having to do any additional work.
4. Click **Add new record**.

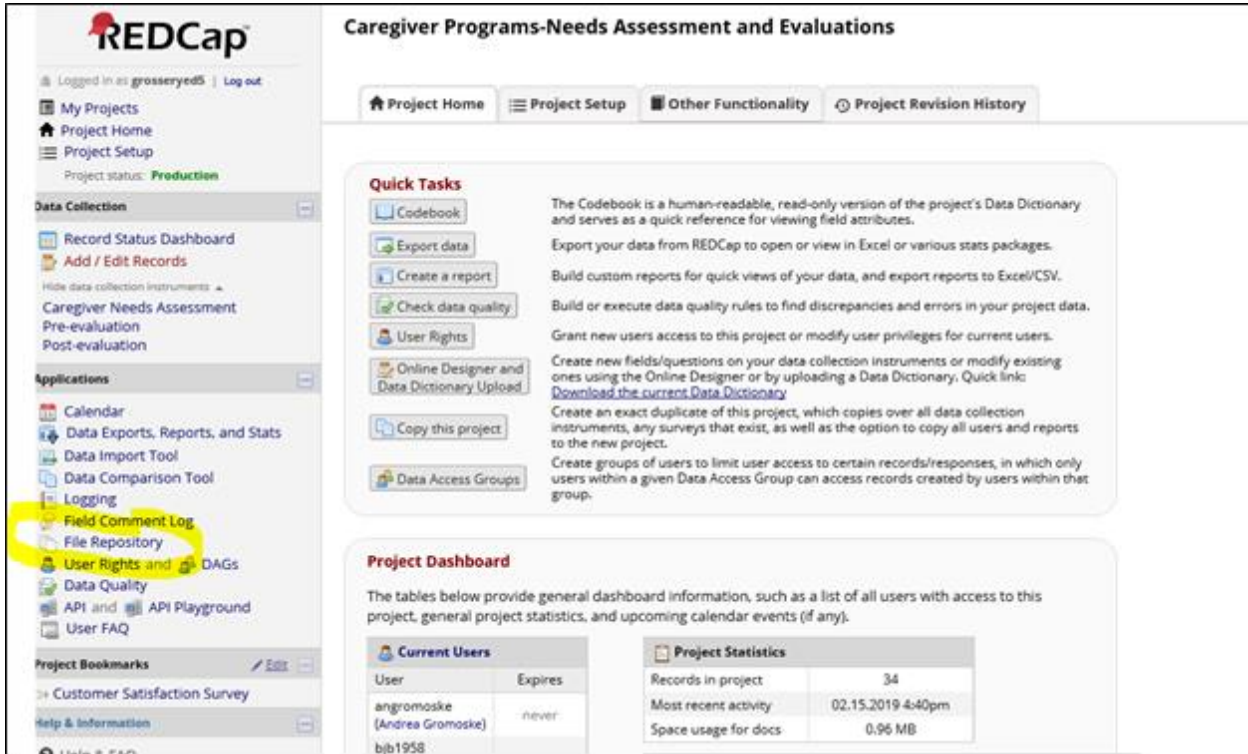


5. This takes one to the caregiver needs assessment.

The picture below is a partial screen shot of the **Caregiver Needs Assessment** instrument.

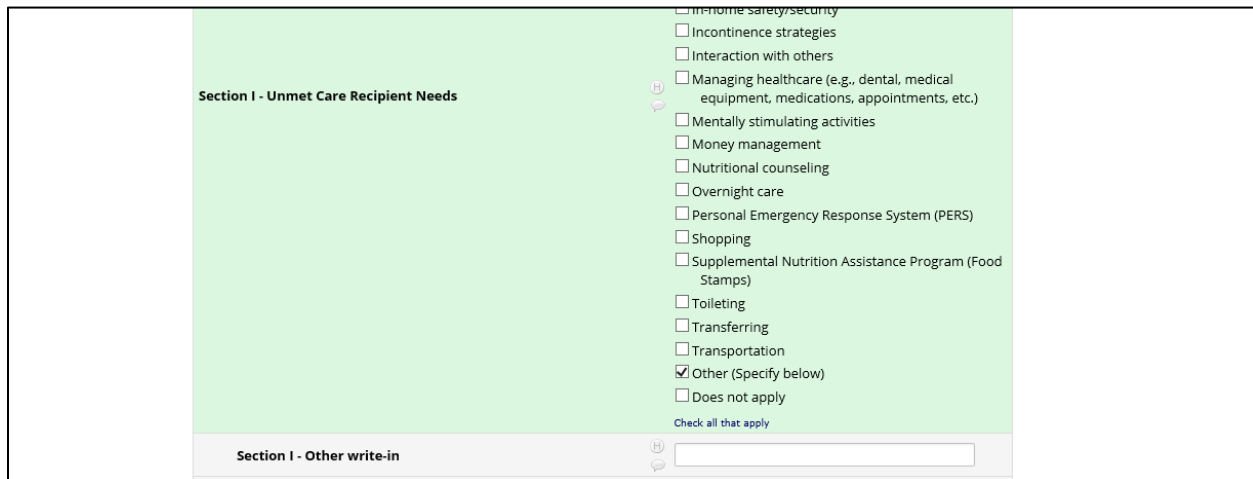
The screenshot shows the REDCap interface for the 'Caregiver Needs Assessment' instrument. The left sidebar contains navigation options like 'My Projects', 'Data Collection', and 'Applications'. The main form area includes a header with 'Actions' (Download PDF, Share instrument), a 'Save & Go To Next Form' button, and a dropdown for 'Assign record to a Data Access Group?'. The form title is 'Caregiver Needs Assessment' and it shows 'Adding new Record ID 19'. The form fields include: Record ID (19), Agency County/Tribe (dropdown), Submitted by (text), Phone Number (text), E-mail (text), Caregiver First Name (text), Caregiver Last Name (text), Caregiver's County/Tribe Residence (dropdown), Care Recipient's County/Tribe Residence (dropdown), Assessment Date (calendar), and Initially enrolled in AFCSP or NFCSP (radio buttons). Below these fields is a section titled 'Top needs identified in each section are based upon notes taken from the five sections in the Caregivers Needs Assessment. LANGUAGE RE: OFFLINE USAGE IN LIEU OF HARDCOPY' with a list of needs: Adaptive equipment, Companionship, Cooking, Dementia Care Specialist referral, Eating, Elder benefits counseling, Grooming, Home delivered meals/congregate dining, Home modification(s), and Housekeeping. Each item has a checkbox.

6. Data entry should correspond to notes taken in the hardcopy version of the assessment, which are stored in DHS REDCap File Repository circled below.



There is a **Notes** section at the bottom of the page, which is optional and is for your own use.

Note that if you choose the "Other" selection in any part of this instrument a text box will pop-up for you to describe the item.



7. When finished entering data for the caregiver needs assessment, choose the **Complete** or **Incomplete** option via the dropdown at the bottom of the instrument. Choose **Save & Exit Form** if you have nothing else to enter at this time.

Support groups
 Other (Specify below)
 Does not apply
 Check all that apply

Notes:

Optional - for your own records

Form Status

Complete? Incomplete

Save & Exit Form Save & Go To Next Form

-- Cancel --

Delete data for THIS FORM only

NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the [Record Home Page](#).

You will then be taken that caregiver's *Record Home Page* that shows the current progress across that caregiver's three instruments. The green dot indicates completion. The default setting is incomplete (red) so please make sure to mark "complete" on instruments when done so you can see a caregiver's progress. Ignore the unverified (yellow) colored button if you ever see this. Yellow is not pertinent to this database.

Caregiver Programs-Needs Assessment and Evaluations

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record

Record ID 12 successfully edited

Record ID 12

Data Collection Instrument	Status
Caregiver Needs Assessment	
Pre-evaluation	
Post-evaluation	

Legend for status icons:
 Incomplete Incomplete (no data saved) ?
 Unverified
 Complete

8. If you have the same caregiver's **Pre-evaluation** to enter, click the gray radio button next to the pre-evaluation on the list. It will take you to the pre-evaluation data entry form. Below is a partial screen shot of the pre-evaluation data entry form.

The screenshot shows a web form titled "Pre-evaluation". At the top right, there are buttons for "Save & Exit Form", "Save & Go To Next Form", and "-- Cancel --". Below the title, it says "Data Access Group: [No]". A blue banner indicates "Editing existing Record ID 5 Doe". The form fields are as follows:

- Record ID:** 5
- Jane Doe**
- Pre-evaluation Date:** A date input field with a calendar icon, a "Today" button, and "M-D-Y" format indicator.
- How would you rate your ability to provide for the person in your care?** with radio buttons for Good, Fair, Poor, and Neutral. A "reset" link is at the bottom right.
- How would you rate your energy to do what is needed?** with radio buttons for Good, Fair, Poor, and Neutral. A "reset" link is at the bottom right.
- How would you rate your mood/morale about performing caregiving tasks?** with radio buttons for Good, Fair, Poor, and Neutral. A "reset" link is at the bottom right.
- How would you rate your physical health at this time?** with radio buttons for Good, Fair, Poor, and Neutral. A "reset" link is at the bottom right.

The Record ID and name of caregiver will link automatically into top of this form. Data entry should follow the hardcopy version. This should be a quick form to fill. Mark **Complete** when finished, and then click **Save & Exit Form**.

Your record home page will now look like this for that same caregiver:

Record Home Page

The grid below displays the form-by-form progress of data entered for the currently selected record. You may click on the colored status icons to access that form/event.

Choose action for record ▾

Record ID 12 successfully edited

Record ID 12

Data Collection Instrument	Status
Caregiver Needs Assessment	
Pre-evaluation	
Post-evaluation	

Legend for status icons:
 Incomplete Incomplete (no data saved) ?
 Unverified
 Complete

It could happen that you have the pre-evaluation completed before the caregiver needs assessment. In that case, you still must enter the caregiver’s record with the needs assessment first, inputting only their first and last name and then mark the assessment as incomplete. You may then enter the pre-evaluation, mark it as complete, and then return to the assessment at a later date to finish it.

Note: You should frequently save your data. You may do so at any time by clicking the **Save & Stay** button. You may need to click the dropdown arrow to switch away from **Save & Go To Next Form**. Also, you may delete an entire form by clicking **Delete data for THIS FORM only**.

How would you rate your mental or emotional health at this time? Poor Neutral reset

How would you rate your knowledge about community resources available to help? Good Fair Poor Neutral reset

Initially enrolled in AFCSP or NFCSP? AFCSP NFCSP reset

Form Status

Complete? ▾

▾

NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the [Record Home Page](#).

[Searching for a Caregiver to Enter Data for Another Instrument](#)

Data entry across all three instruments will likely never occur in a single session. Time will pass between entry of the three instruments. To search for a caregiver or to edit previous data entry, select the **Record Status Dashboard** under the Data Collection section.

REDCap™

Logged in as **grosseryed5** | Log out

- My Projects
- Project Home
- Project Setup
- Project status: **Production**

Data Collection

- Record Status Dashboard**
- Add / Edit Records
- Hide data collection instruments
- Caregiver Needs Assessment
- Pre-evaluation
- Post-evaluation

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Data Quality
- API and API Playground
- User FAQ

Caregiver Programs-Needs Assessment and Evaluation

Project Home | Project Setup | Other Functionality

Quick Tasks


- Codebook**: The Codebook is a human-readable, read-only reference for viewing data.
- Export data**: Export your data from REDCap to open or closed spreadsheet formats.
- Create a report**: Build custom reports for quick views of your data.
- Check data quality**: Build or execute data quality rules to find data quality issues.
- User Rights**: Grant new users access to this project or modify existing user rights.
- Online Designer and Data Dictionary Upload**: Create new fields/questions on your data collection instruments using the Online Designer or by uploading a Data Dictionary. [Download the current Data Dictionary OR make changes](#)
- Copy this project**: Create an exact duplicate of this project, with all instruments, any surveys that exist, as well as data, to the new project.
- Data Access Groups**: Create groups of users to limit user access to data. Users within a given Data Access Group can only access data within that group.

Project Dashboard

The tables below provide general dashboard information, such as a project general project statistics, and upcoming calendar events (if applicable).



The sample below shows only the records that your agency’s Data Access Group members have started or completed. It shows their current progress. You will see the caregiver’s last name next to a Record ID. This should make it easy to find them when you need to update, edit or enter data into the next instrument.


Caregiver Programs-Needs Assessment and Evaluations


 **Record Status Dashboard (all records)**

Displayed below is a table listing all existing records/responses and their status for every data collection instrument (and if longitudinal, for every event). You may click any of the colored buttons in the table to open a new tab/window in your browser to view that record on that particular data collection instrument. Please note that if your form-level user privileges are restricted for certain data collection instruments, you will only be able to view those instruments, and if you belong to a Data Access Group, you will only be able to view records that belong to your group.

Legend for status icons:

 Incomplete  Incomplete (no data)













 Unverified

 Complete

Displaying Data Access Group -- ALL -- ▼

Displaying record "2" through "5" ▼ of 4 records

Displaying: [Instrument status only](#) | [Lock status only](#) | [All status types](#)

Record ID	Caregiver Needs Assessment	Pre-evaluation	Post-evaluation
2 Grosso			
3 Gall			
4			
5 Doe			

Agencies will only have access to records that they have added. All individuals in your agency’s group will have access to each other’s records. No one else, other than DHS administrators, will have access to the records that you have entered. No reports will ever be run that include personally identifying information about the caregivers you serve.

Once you find a caregiver in the **Record Status Dashboard**, click on any of the three circle buttons and it will open that instrument regardless if its completion status.

Add the Post-evaluation

You may enter data from a caregiver's final instrument, the post-evaluation, by clicking the **Post-evaluation** link from the data collection section or clicking the post-evaluation radio button on the **Record Status Dashboard**.

Caregiver Programs-Needs Assessment and Evaluations

Actions: [Download PDF of instrument\(s\)](#) [Share instrument in the Library](#) VIDEO: Basic data

Post-evaluation Data Access Group: [No Assignment] ?

Editing existing Record ID 5 Doe

Record ID: 5
Jane Doe

Has the caregiver completed a post-evaluation? Yes No
* must provide value [reset](#)

Form Status

Complete? [reset](#)

[Save & Exit Form](#) [Save & Stay](#) [-- Cancel --](#)

[Delete data for THIS FORM only](#)

The **Post-evaluation** asks the same questions as the **Pre-evaluation**, but there is a validation question that must be answered first. You must choose “Yes” in order for the DHS REDCap post-evaluation fields to appear for data entry.

Post-evaluation Data Access Group: [No Assignment] ?

Editing existing Record ID 5 Doe

Record ID: 5
Jane Doe

Has the caregiver completed a post-evaluation? Yes No
* must provide value [reset](#)

Post-evaluation Date: Today M-D-Y

How would you rate your ability to provide for the person in your care? Good Fair Poor Neutral [reset](#)

How would you rate your energy to do what is needed? Good Fair Poor Neutral [reset](#)

How would you rate your mood/morale about performing caregiving tasks? Good Fair Poor Neutral [reset](#)

[Save & Exit Form](#) [Save & Stay](#) [-- Cancel --](#)

If the caregiver has not filled out a post-evaluation, another question will appear asking why they have not completed it. Select the item that best reflects the reason.

Post-evaluation Data Access Group: [No]

Editing existing Record ID 5 Doe Save & Exit Form
Save & Stay
-- Cancel --

Record ID 5

Jane Doe

Has the caregiver completed a post-evaluation? Yes No reset

* must provide value

Why did caregiver not complete post-evaluation? (check all that apply) Care recipient deceased Caregiver deceased Moved/Cannot Locate Refused

Form Status

Complete? Save & Exit Form Save & Stay
-- Cancel --

Delete data for THIS FORM only

NOTE: To delete the entire record (all forms/events), see the record action drop-down at top of the [Record Home Page](#).

When finished, choose “Complete” in the dropdown and then click the **Save & Exit Form** button.

At this point, all data that can be entered has been entered for that caregiver.

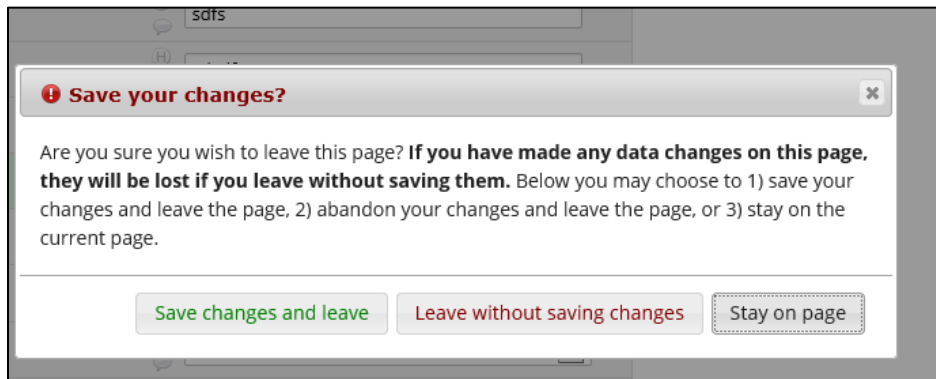
You may edit any entry at any time regardless of completion status.

SUMMARY

- Your entire access area is within the **Data Collection** section on the left margin of REDCap.
- You begin a record by clicking either the **Add/Edit Records** link or the **Caregiver Needs Assessment** link in the **Data Collection** section.
- You will start the entry of every caregiver with a **Caregiver Needs Assessment** whether one has been completed or not. (e.g., gets the caregiver’s name into the system)
- The **Record Status Dashboard** in the **Data Collection Section** is where you go to see the data entry status across all three instruments. It is also where you begin data entry for incomplete instruments by selecting the appropriate gray radio button for each instrument in the dashboard’s matrix.
- Save your work frequently!
- Mark instruments complete or incomplete immediately after data entry. A red dot means it is incomplete. A green dot means it is complete.

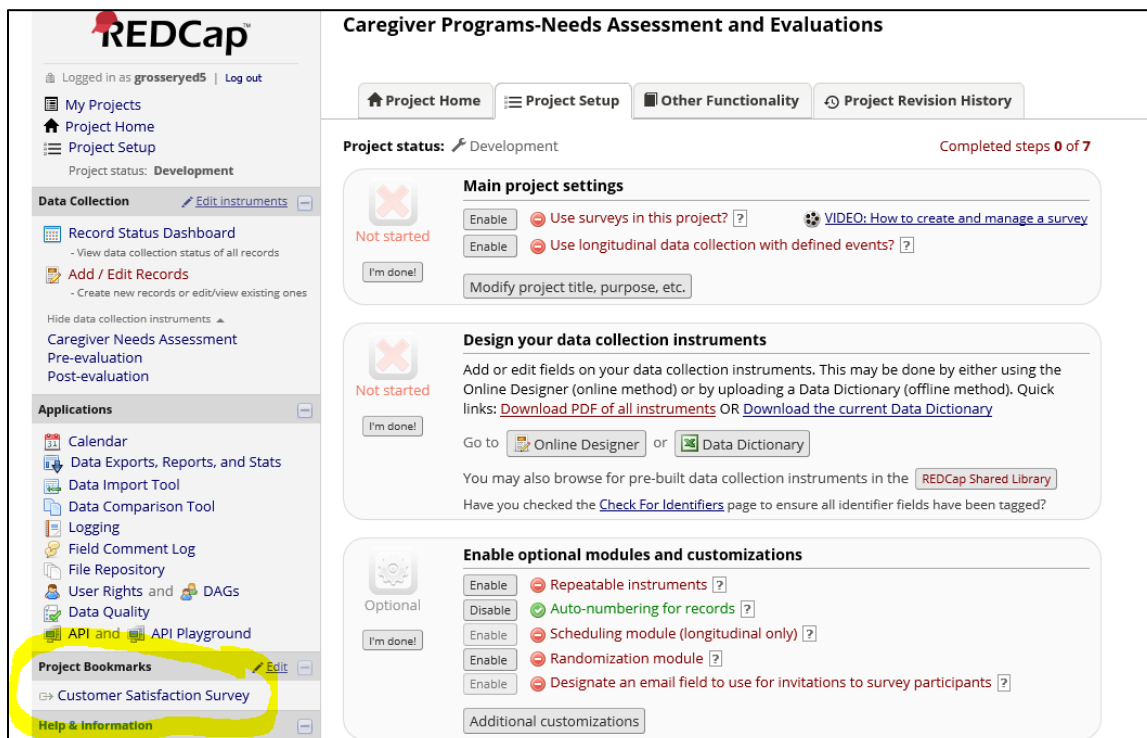
Additional Notes

- Your DHS REDCap account will be deactivated if you have not logged onto it within a 365-day period
- DHS REDCap will automatically log you out of a session if you have not interacted with it for a certain period of time. Please make sure to periodically save your data entry throughout any data entry session.
- You may get the following screen if you try to leave a data entry instrument without first saving your data.



Customer Satisfaction Survey

This not part of the REDCap system, but is required to give to caregivers. The link in REDCap will take you to both the hardcopy and web versions of the survey.



REDCap
Logged in as grosseryed5 | Log out

My Projects
Project Home
Project Setup
Project status: Development

Data Collection [Edit instruments](#)

Record Status Dashboard
- View data collection status of all records

Add / Edit Records
- Create new records or edit/view existing ones

Hide data collection instruments ▲
Caregiver Needs Assessment
Pre-evaluation
Post-evaluation

Applications

- Calendar
- Data Exports, Reports, and Stats
- Data Import Tool
- Data Comparison Tool
- Logging
- Field Comment Log
- File Repository
- User Rights and DAGs
- Data Quality
- API and API Playground

Project Bookmarks [Edit](#)

- Customer Satisfaction Survey

Help & Information

Caregiver Programs-Needs Assessment and Evaluations

Project Home | Project Setup | Other Functionality | Project Revision History

Project status: Development Completed steps 0 of 7

Main project settings

Not started

Enable Use surveys in this project? [?](#) [VIDEO: How to create and manage a survey](#)

Enable Use longitudinal data collection with defined events? [?](#)

[I'm done!](#) [Modify project title, purpose, etc.](#)

Design your data collection instruments

Not started

[I'm done!](#)

Add or edit fields on your data collection instruments. This may be done by either using the Online Designer (online method) or by uploading a Data Dictionary (offline method). Quick links: [Download PDF of all instruments](#) OR [Download the current Data Dictionary](#)

Go to [Online Designer](#) or [Data Dictionary](#)

You may also browse for pre-built data collection instruments in the [REDCap Shared Library](#)

Have you checked the [Check For Identifiers](#) page to ensure all identifier fields have been tagged?

Enable optional modules and customizations

Optional

[I'm done!](#)

Enable Repeatable instruments? [?](#)

Disable Auto-numbering for records? [?](#)

Enable Scheduling module (longitudinal only)? [?](#)

Enable Randomization module? [?](#)

Enable Designate an email field to use for invitations to survey participants? [?](#)

[Additional customizations](#)